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ONTARIO'S BUSINESS TRAVEL MARKET – 1996

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Business travel — it's where the money is!

Ontario hosted about 11 million business visitors in 1996. People travelling here on business spend much more money than other travellers. Business visitors spend about 50 percent more than a pleasure traveller (and about four times more than people visiting friends and family). This is just one of the findings of *Ontario's Business Travel Market* report which discusses characteristics of the province's business travel market.

While business travel makes up about 11 percent of Ontario's travel market, it accounts for more than 25 percent of tourism spending ($2.7 billion). This is mainly because business travellers have higher per person expenditures and are more likely to stay overnight.

The business travel market could provide even greater benefits. According to Dr. Dorothy Riddle of Service-Growth Consultants, a majority of business travellers will extend their business trips for pleasure when they can. "There is enormous residual potential in this market," says Dr. Riddle. "Business tourism will be one of the hottest growth markets for travel industry providers in the year ahead."

Where do Ontario's business travellers come from?

About two-thirds of the province's business travellers are from Ontario. Individually, these Ontarians spend less money than other business travellers (because they take mainly day trips), but they still account for 35 percent of total business visitor spending. Twenty percent of Ontario's business travel market is American. These visitors come mainly from the border states of Michigan, Ohio, New York, and Illinois. Quebec leads other provinces in business visits to Ontario (about six percent), and most of these people come from Montreal.

While overseas business visitors (who are mostly from Japan and the U.K.) represent only four percent of the market, they spend the most money per person. Overseas travellers spend an average of $1200 per day and account for about 18 percent of total business expenditures. American business travellers from non-border states also are big spenders averaging about $800 each.

Where do they go?

No surprise here — Metro Toronto is the top region visited by business travellers (36 percent). Other popular areas are: Southwestern Ontario (London west to Windsor), Festival Country (Niagara Peninsula, Hamilton, Kitchener-Waterloo, Stratford), and Ontario East (Kingston east to the Quebec border). Each of these travel regions attracts about 15 percent of the market.

How long do they stay?

Business travellers tend to stay for a shorter length of time than other visitors. Most business visits are same-day (64 percent), compared to overnight (36 percent). Those from Ontario tend to return home at the end of the day, and only 25 percent of these business travellers require overnight accommodation. A similar trend is true for American business travellers from border states -- two-thirds of these U.S. business people do not stay overnight in Ontario. Americans from farther away and overseas visitors account for most of the overnight business.

Convention travel

Of the total number of Canadian and American business travellers (10.7 million), almost one million are in Ontario to attend a convention or similar event. This means that about 9.7 million business travellers are involved in other business-related activities.

What do business travellers like to do in their leisure time?

1. Shopping (14 percent)
2. Sightseeing (8 percent)
3. Nightlife/entertainment (6 percent)
4. Outdoor sports (5 percent)
5. Cultural events (4 percent)

What do they spend their money on?

Of particular interest were expenditures made by business travellers. The highest expenditures for business travellers were for, in descending order, accommodation, transportation and food and beverage. However, for all other visitor types the highest expenditures were for food and beverage, retail and accommodation.

When do they come?

Winter appears to be the business travel season with the January-to-March period accounting for 28 percent of business visits followed by April-to-June with 27%. Given that pleasure visitors prefer to travel in the third quarter (41%) and travellers visiting family and friends in the second half of the year, these findings suggest off-season tourism potential for business visitors.

Are there any new opportunities in the report's findings?

Asking questions about the information contained in *Ontario's Business Travel Market* report will help you to determine whether new opportunities exist. For example:

- Why do two-thirds of American visitors from border states leave Ontario rather than stay overnight (despite a favourable exchange rate for the U.S. dollar)?

- Montreal sends Ontario half a million business visitors every year. Is there a captive market here? (Marketing your product to a city is far more manageable than marketing it to a country)

- We know that business travellers like to shop, sightsee and enjoy nightlife and cultural events in their leisure time — how should the tourist industry market itself to promote these opportunities?

- Convention travel accounts for less than 10 percent of Ontario's business travel market -- what are the other business travellers doing? (They're visiting potential clients, customers, associates, parent companies, suppliers, etc.) How many business travelers visit the major firms in your area

Les voyages d'affaires, un marché profitable!

L'Ontario a accueilli quelque 11 millions de voyageurs d'affaires en 1996. Les gens d'affaires en visit dans la province y dépensent environ 50 pour 100 de plus que les personnes en voyage d'agrément et environ quatre fois plus que les personnes qui rendent visite à des amis ou à des membres de leur famille. Ce n'est qu'une des constatations figurant dans le rapport intitulé *Ontario's Business Travel Market*, qui présente les caractéristiques du marché provincial des voyages d'affaires.

Bien que les voyages d'affaires représentent environ 11 pour 100 du marché ontarien des voyages, ils sont à l'origine de plus de 25 pour 100 des dépenses dans le secteur du tourisme (2,7 milliards de dollars). Cette situation est principalement attribuable aux dépenses plus élevées par personne et aux séjours plus longs des voyageurs d'affaires.

Le marché des voyages d'affaires pourrait s'avérer encore plus avantageux. En effet, selon M^me^ Dorothy Riddle, de la société Service-Growth Consultants, la plupart des gens d'affaires en visite prolongent leur voyage pour se distraire et se détendre lorsqu'ils ont terminé leur travail et lorsqu'ils en ont la possibilité. «Ce marché offre un potentiel résiduel énorme, de dire M^me^ Riddle. Le tourisme d'affaires sera un des marchés qui affichera la plus forte croissance au sein de l'industrie au cours des prochaines années.»

D'où les gens d'affaires en visite en Ontario viennent-ils?

Environ les deux tiers des gens d'affaires en visite dans la province viennent d'une région de l'Ontario. Ces voyageurs dépensent moins d'argent par personne que les autres voyageurs d'affaires parce qu'ils effectuent surtout des voyages d'une journée. Toutefois, leurs dépenses représentent 35 pour 100 de toutes les dépenses effectuées dans la province par les voyageurs d'affaires. Vingt pour cent des gens d'affaires en visite en Ontario viennent des États-Unis, principalement des États frontaliers du Michigan, de l'Ohio, de New York et de l'Illinois. En ce qui concerne les voyageurs d'affaires canadiens, la plupart viennent du Québec (environ six pour cent), la majorité d'entre eux, de Montréal.

Bien que les visiteurs d'outre-mer (qui viennent pour la plupart du Japon et du Royaume-Uni) représentent seulement quatre pour cent du marché, leurs dépenses par personne sont les plus élevées, en moyenne 1 200 $ par jour, soit environ 18 pour 100 des dépenses de tous les gens d'affaires en visite dans la province. Les dépenses des voyageurs américains n'habitant pas dans les États frontaliers sont aussi très élevées, soit environ 800 $ par personne.

Où les voyageurs d'affaires se rendent-ils en Ontario?

Il n'est guère étonnant de constater que la majeure partie (36 pour 100) des voyageurs d'affaires se rendent dans l'agglomération torontoise. Les autres régions fréquemment visitées sont le sud-ouest de l'Ontario (de London à Windsor), la région des festivals (la péninsule de Niagara, Hamilton, Kitchener-Waterloo et Stratford), et l'est de l'Ontario (de Kingston à la frontière du Québec). Chacune de ces régions attire environ 15 pour 100 du marché.

Combien de temps passent-ils dans la province?

En règle générale, les séjours des voyageurs d'affaires sont plus courts que ceux des autres visiteurs. En effet, 64 pour 100 des gens d'affaires effectuent des voyages d'un jour, alors que 36 pour 100 passent plus d'une journée dans la province. En ce qui concerne les voyageurs d'affaires ontariens, seulement 25 pour 100 d'entre eux ont besoin d'hébergement pour une nuit ou plus. La situation est la même pour les voyageurs d'affaires venant des États frontaliers américains. Les deux tiers d'entre eux ne passent pas la nuit en Ontario. Les Américains venant des autres États et les visiteurs d'outre-mer sont la principale clientèle ayant besoin d'hébergement.

Voyageurs assistant à un congrès

Sur les 10,7 millions de voyageurs d'affaires canadiens et américains, près d'un million se rendent en Ontario pour assister à un congrès ou à un événement semblable. Cela signifie qu'environ 9,7 millions de voyageurs se livrent à d'autres activités ayant trait aux affaires.

À quoi les voyageurs d'affaires consacrent-ils leurs temps libres?

1. Magasinage (14 pour 100)
2. Visites touristiques (8 pour 100)
3. Spectacles et divertissements (6 pour 100)
4. Activités de plein air (5 pour 100)
5. Activités culturelles (4 pour 100)

Quelles sont les dépenses des voyageurs d'affaires?

Par ordre décroissant, les dépenses les plus importantes sont l'hébergement, les transports et les restaurants. Toutefois, pour tous les autres types de voyageurs, les dépenses les plus importantes sont les restaurants, le magasinage et l'hébergement.

À quel moment de l'année les voyageurs d'affaires viennent-ils en Ontario?

La plupart des voyageurs d'affaires viennent en Ontario entre les mois de janvier et de mars (28 pour 100), et entre les mois d'avril et de juin (27 pour 100). On a constaté que la majeure partie (41 pour 100) des personnes en voyage d'agrément préfèrent venir en Ontario au cours du troisième trimestre et que les personnes qui rendent visite à des amis ou à des membres de leur famille effectuent leurs voyages au cours de la seconde moitié de l'année. Ces constatations révèlent le potentiel touristique du marché des voyages d'affaires hors-saison.

Le rapport mentionne-t-il de nouveaux débouchés?

Après avoir pris connaissance du rapport intitulé *Ontario's Business Travel Market*, posez-vous les questions suivantes pour déterminer s'il existe de nouveaux débouchés :

- Pourquoi les deux tiers des Américains venant des États frontaliers ne passent-ils pas la nuit en Ontario (alors que le taux de change leur est très favorable)?

- Chaque année, un demi-million de gens d'affaires de Montréal se rendent en Ontario. Représentent-ils un marché captif? (N'oubliez pas qu'il est beaucoup plus facile de commercialiser vos produits dans une ville que dans un pays.)

- On sait que les voyageurs d'affaires aiment magasiner, faire du tourisme, se livrer à des activités culturelles et assister à des spectacles pendant leurs temps libres. Que devraient faire les entreprises de l'industrie du tourisme pour mieux se faire connaître et tirer parti de ces débouchés?

- Moins de 10 pour 100 des voyageurs d'affaires se rendent en Ontario pour assister à un congrès. Que font les autres voyageurs d'affaires? (Ils rendent visite à des clients actuels et potentiels, à des associés et à des fournisseurs, ils se rendent dans les bureaux de leur société mère, etc.) Combien de voyageurs d'affaires visitent les grandes entreprises de votre région?

ONTARIO'S BUSINESS TRAVEL MARKET - 1996

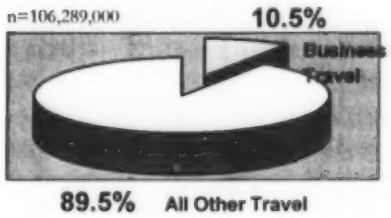
DESCRIPTION

The business traveller is an important market segment for tourism destinations. Business travellers are characterized by higher per person expenditures and the choice of hotels as the preferred type of accommodation.

This report discusses characteristics of Ontario's business travel market. For example, the report compares overnight versus same-day business travel, the Ontario business travel market to other travel segments and reviews characteristics such as origin and spending.

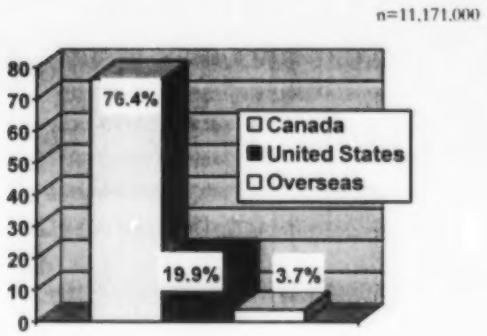
In 1996, 106 million person visits were made in Ontario by same-day and overnight travellers from across Canada (including Ontario) and around the world (Figure 1). Of these visitors, 10.5 percent (11 million) travelled to Ontario for business.

Figure 1. Portion of Business Travellers in Ontario



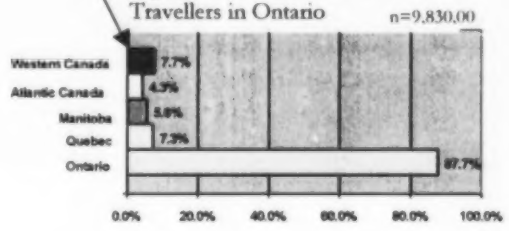
Over 8.5 million of the 11 million business travellers were from origins within Canada (Figure 2a). Of these, 88 percent were Ontarians (Figure 2b). International business visitors accounted for 23.6 percent of business travellers. Nearly 20 percent of all international business travellers visited from the United States and the remaining 3.6 percent were overseas visitors.

Figure 2a. Origin of Business Visitors in Ontario



Business travellers from Ontario accounted for 67 percent of all business travel to the province (Table 1). This share was slightly smaller than the overall

Figure 2b. Domestic Business Travellers in Ontario



travel within Ontario by residents (69% of all visitors to Ontario). Toronto generated 7.1 percent (793,000) of Ontario's business travel, the most significant of single origins. Ottawa/Hull residents accounted for 3.9 percent of business visitors to Ontario. This share was slightly higher than Ottawa's total visit count to Ontario (3.3%).

Of the domestic business visitors to the Province, Quebec generated the most business visits (5.6%). Eighty percent of Quebec business visitors originated from Montreal. This share was considerably higher than other visitor types from Montreal visitors who account for 63 percent of all Quebec visits to Ontario.

As expected, most of the U.S. business visitors to the Province, came from the border states of Michigan (6.4%), New York (2.4%) and Ohio (2.3%). Of non-border states California had the highest incidence of business travel to Ontario; over 30 percent of all

visitors from California came to Ontario for business reasons.

Overseas business visitors were led by Japan (0.6%) and the United Kingdom (0.5%).

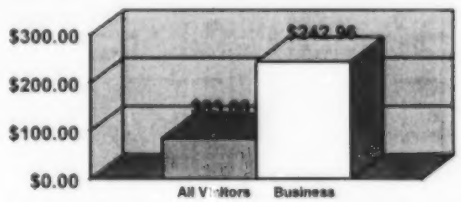
Table 1: TOTAL BUSINESS TRAVEL VISITORS IN ONTARIO BY ORIGIN

ORIGIN	All Other Visitors (000's)	%	Business Visitors (000's)	%
OTHER CANADA	2,848	3.0	8,536	76.4
ONTARIO	65,815	69.2	7,486	67.0
Toronto	7,393	7.8	793	7.1
Ottawa/Hull	3,115	3.3	437	3.9
Niagara Falls	1,791	1.9	146	1.3
Kingston	1,279	1.3	204	1.8
Windsor	909	1.0	108	1.0
QUEBEC	1,777	1.9	625	5.6
Montreal	1,126	1.2	503	4.5
Quebec City	78	*	34	0.3
MANITOBA	386	0.4	91	0.8
Winnipeg	330	0.3	82	0.7
ATLANTIC CANADA	88	*	363	3.3
Halifax	57	*	31	0.3
WESTERN CANADA	437	0.5	239	5.9
Vancouver	127	0.1	93	0.8
Calgary	68	*	69	0.7
Edmonton	49	*	31	0.3
Saskatoon	16	*	5	*
Regina	15	*	4	*
USA	24,285	25.5	2,224	19.9
Michigan	10,726	11.3	714	6.4
New York	7,065	7.4	268	2.4
Ohio	1,243	1.3	256	2.3
Pennsylvania	898	0.9	81	0.7
Illinois	610	0.6	98	0.9
Minnesota	594	0.6	57	0.5
Wisconsin	368	0.4	49	0.4
California	234	0.2	103	0.9
Florida	243	0.3	31	0.3
New Jersey	183	0.2	64	0.6
Massachusetts	184	0.2	53	0.5
OVERSEAS	2,170	2.3	411	3.7
United Kingdom	375	0.4	50	0.5
Japan	270	0.3	70	0.6
Germany	218	0.2	27	0.2
France	198	0.2	17	0.2
South Korea	99	0.1	24	0.2
Hong Kong	102	0.1	9	*
Italy	70	*	14	0.1
Australia	62	*	13	0.1
Netherlands	65	*	7	*
Israel	56	*	9	*
India	51	*	6	*
Taiwan	39	*	11	0.1
Mexico	34	*	14	0.1
Switzerland	41	*	6	*
Brazil	36		8	*

Percentages rounded to nearest decimal **less than 0.1%*

EXPENDITURES

Business visitors to Ontario spent an average of $243 per person/per trip (Figure 3). Compared to the average expenditure by all other visitors ($84),

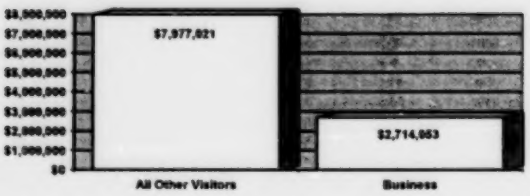


business travellers spent nearly three times more.

Figure 3. Average expenditure (per trip) in Ontario

As shown in Figure 4, business travellers spent a total of $2.7 billion while visiting Ontario compared to nearly $8 billion spent by all other visitors. Although business travellers to Ontario accounted for less than 11 percent of all visits, they generated almost 35 percent of total visit expenditures.

Figure 4. Total Expenditures (000's)



Ontario residents had the lowest average spending (Table 2) per business visitor ($123) but the highest total expenditures ($0.9 billion). The total expenditure figure is the highest because most of Ontario's business visitors come from Ontario.

American business travellers from non-bordering states had an average per person expenditure of $811, over three times higher than business visitors from border states.

Overseas business visitors had the highest average spending at $1200 per person. This expenditure was almost two times more than the average spent by all overseas travellers to Ontario.

Table 2. AVERAGE (per trip) AND TOTAL BUSINESS SPENDING IN ONTARIO

	All Other Visitors (000's)	Business Visitors (000's)
OTHER CANADA	$1,305,229	$388,221
Average	$458.30 /person	$369.73/person
ONTARIO	$3,577,643	$918,785
Average	$54.36/person	$122.73/person
OTHER USA	$567,129	$567,609
Average	$162.88/person	$810.87/person
BORDER STATES	$1,872,524	$342,693
Average	$81.32/person	$224.86/person
OVERSEAS	$1,573,282	$496,745
Average	$609.56/person	$1208.62/person

Table 3 identifies the categories of expenditures for all visitors and for business visitors. Of particular interest are the differing types of expenditures between the two visitor groups. For instance, the higher expenditures for business travellers were for the categories of accommodations, transportation and food and beverage respectively. However, by comparison, the higher expenditures for all other visitors were for food and beverage, retail and accommodation respectively.

Table 3. TOTAL EXPENDITURES BY CATEGORY

	All Other (000's)	Business (000's)
Public/local transport (includes air)	$870,218	$657,275
%	10.9%	24.2%
Automobile	$1,251,650	$364,677
%	15.7%	13.4%
Accommodation	$1,270,711	$838,827
%	15.9%	30.9%
Food & beverage	$2,038,307	$543,320
%	25.6%	20.0
Recreation & entertainment	$986,771	$104,273
%	12.4%	3.8%
Retail & other	$1,559,367	$205,679
%	19.6%	7.6%

Accommodation spending accounted for the highest average per trip expenditures (same-day and overnight combined) for business visitors (Table 4) from Canada ($168), Ontario ($29) and the U.S. ($139). Average expenditures for private and rented vehicles ($28) were the second highest expense for business visitors from Ontario. This was not the case however, for U.S. and other Canadian business travellers, whose second highest average expenditures were for public/local transport ($116) and food and beverage ($107; U.S. and Canada respectively). For both Ontario and U.S. business visitors, average food and beverage purchases ($27 and $73; Ontario and U.S. respectively) were the third highest source of expenditure.

As might be expected, public/local transport (including air travel) was the highest category of average spending ($435) for overseas business travellers. For overseas business visitors the second highest share of average expenditures was for accommodation ($326) followed by food and beverage ($157).

Table 4. BUSINESS TRAVEL SPENDING IN ONTARIO AND AVERAGE SPENDING PER PERSON BY CATEGORY

	Other Canada (000's)	ON (000's)	ALL USA (000's)	Overseas (000's)
Public/local transport (excludes air)	$23,150 $22.04/person	$196,855 $26.30/person	$258,517 $116.20/person	$178,753 $435.20/person
Auto (private and rental)	$55,935 $53.27/person	$212,455 $28.40/person	$73,766 $33.10/person	$22,621 $55.10/person
Accommodation	$176,284 $167.89/person	$220,394 $29.40/person	$308,228 $138.60/person	$133,921 $326.10/person
Food & beverage	$112,255 $106.90/person	$205,407 $27.40/person	$161,301 $72.50/person	$64,357 $156.70/person
Recreation & entertainment	$10,502 $10.00/person	$22,445 $3.00/person	$50,773 $17.00/person	$20,553 $50.00/person
Retail & other	$10,095 $9.60/person	$61,229 $8.20/person	$57,816 $26.00/person	$76,539 $186.40/person

AVERAGE PARTY SIZE

Compared to all visitors, most business travellers to Ontario tend to travel alone (Table 5). The average party size for Other U.S. (1.2), border states (1.5) and Overseas visitors(1.5) is slightly higher but still less than two persons. This could suggest that international visitors to Ontario have a greater tendency to travel with friends, relatives or colleagues.

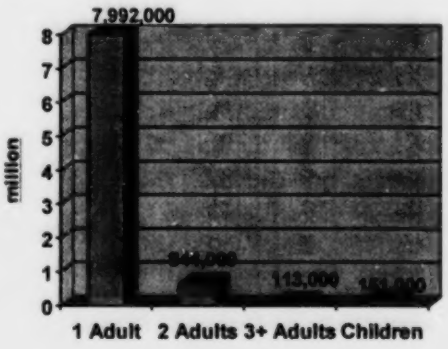
Table 5. AVERAGE PARTY SIZE

	All Other Total	Business
OTHER CANADA	1.6	1.1
ONTARIO	1.6	1.1
OTHER USA	2.3	1.2
BORDER STATES	2.2	1.5
OVERSEAS	1.9	1.5

PARTY COMPOSITION

Figure 5 presents the composition of the 8.9 million business travelling parties to Ontario. Consistent with the above table, the figure below shows that almost 90 percent (7.9 million) of business visitors travelled alone. Only 7 percent of travellers came with one other adult. Some 151,000 (1.7%) visitors brought children on their business trips and only 113,000 came with three or more adults.

Figure 5. Party Composition



The table below identifies party composition by origin. Less than two percent of business visitors from all origins travelled with children. Business visitors from Ontario had a slightly higher (1.9%) incidence of travel with children compared to other origins.

More overseas business visitors travelled in groups comprised of two adults (21%) or 3 or more adults (8.5%) compared to visitors from other origins.

Table 6. PARTY COMPOSITION OF BUSINESS VISITORS BY ORIGIN

	1 Adult (000's)	2 Adults (000's)	3+ Adults (000's)	Children (000's)
OTHER CANADA	940	41	1	8
%	95.0	4.1	0.1	0.8
ONTARIO	6204	400	31	131
%	91.7	5.9	0.5	1.9
OTHER USA	383	79	26	3
%	78.2	16.1	5.3	0.6
BORDER STATES	304	75	35	6
%	72.0	17.9	8.3	1.4
OVERSEAS	161	49	20	3
%	69	21	8.5	1.3

CALENDAR QUARTER

Compared to other visitor types to Ontario, business visitors have a higher incidence of travel during the first and second quarter. Specifically, almost 55 percent of business trips occurred between January and June compared to 45 percent of trips by other visitors. There is only a small difference between business trips taken in the third quarter (23.1%) compared to those taken in the last quarter (22.3%). This is contrary to trips by all other visitors, where the difference between the third (34%) and fourth (21.0%) quarter was over 10 percentage points.

Table 7. VISITORS IN ONTARIO BY CALENDAR YEAR

	All Other (000's)	Business (000's)
QUARTER I (JAN-MAR)	20,283 (21.3%)	3,119 (27.9%)
QUARTER II (APR-JUN)	22,192 (23.3%)	2,984 (26.7%)
QUARTER III (JUL-SEPT)	32,624 (34.3%)	2,582 (23.1%)
QUARTER IV (OCT-DEC)	20,017 (21.0%)	2,488 (22.3%)

ACTIVITY PARTICIPATION

Shopping is the most popular activity for business visitors (Table 8). This activity is participated in by almost 15 percent of business visitors. Sightseeing and nightlife/entertainment follow in popularity with 8 percent and 6 percent (respectively) participation.

Table 8. ACTIVITIES PARTICIPATED IN DURING TRIP

	Business	%
Shopping	1,589,000	14.2
Sightseeing	871,000	7.8
Nightlife/Entertainment	692,000	6.2
Outdoor Sports	564,000	5.1
Cultural Events	409,000	3.7
Parks/Historic Sites	296,000	2.6
Sports Events	272,000	2.4
Festivals/Fairs	215,000	1.9
Theme Parks	71,000	0.6

VISITS TO ONTARIO TRAVEL REGIONS

Overall, Metro Toronto was the top region visited by business travellers, accounting for 36.4 percent of total visits. This differs from the visits made by other visitor types to Ontario where Metro Toronto (17.0%) was the third most popular region following Southwestern Ontario (21.7%) and Festival Country (20.7%). Southwestern Ontario (16.4%) and Festival Country (15.5%) were the second and third (respectively) most popular regions for business travellers.

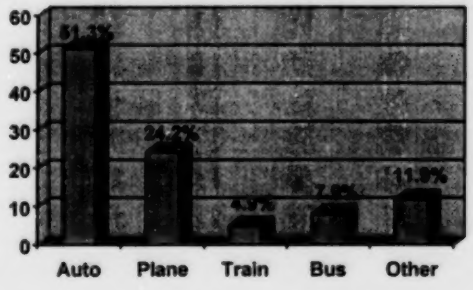
Table 9. BUSINESS VISITS IN ONTARIO'S TRAVEL REGIONS

	All Other (# of trips) (000's)	All (%)	Business (# of trips) (000's)	Business (%)
1-SW Ontario	20,708	21.7	1,835	16.4
2-Festival	19,683	20.7	1,734	15.5
3-Lakelands	8,972	9.4	480	4.2
4-Toronto	16,164	17.0	4,061	36.4
5-Getaway	10,041	10.6	790	7.1
6-Ontario East	13,411	14.1	1,608	14.4
OTAP 7-12	8,962	9.4	669	6.0
Unknown	286	0.3	290	2.6

MODE OF TRANSPORT

Half (6.9 million) of business travellers used the automobile (Figure 6) during their visit to Ontario and almost one quarter used the airplane (3.2 million). Fewer business visitors reported using the bus (1.0 million). The train was the least used method, used by only 657,000 visitors.

Figure 6. Method of Travel



As would be expected, Ontarians (92.5%) reported the highest use of the automobile (Table 10), followed by Americans from border states (81.8%).

Overseas business visitors (14.2%) used the plane more compared to visitors from other origins. This was also the case for overseas business visitors' use of the bus (16.2%) while in Ontario.

Table 10. MODE OF TRANSPORT BY ORIGIN

	Auto	Plane	Train	Bus	Other
OTHER CANADA n=1.0 million	37.4%	65.7%	1.3%	0.5%	-
ONTARIO n=7.5 million	92.5%	5.2%	1.2%	1.0%	-
OTHER USA n=813,000	59.0%	5.0%	1.8%	8.1%	8.1%
BORDER STATES n= 1.6 million	81.8%	1.7%	0.6%	5.6%	10.3%
OVERSEAS N=411,000	41.2%	19.5%	5.7%	16.2%	22.7%

OVERNIGHT AND SAME-DAY BUSINESS TRAVEL

Table 11 identifies the same-day and overnight visits taken by business travellers. A greater percentage of business visitors took same-day (63.7%) trips compared to overnight trips (36.3%). These results are consistent with the distribution of overnight and same-day visits taken by all visitors to Ontario.

TABLE 11: BUSINESS TRAVEL VISITORS IN ONTARIO

	All Other Visitors (000's)	%	Business Visitors (000's)	%
Total	95,118	100.0	11,171	100.0
Same-day	60,230	63.3	7,114	63.7
Over-night	34,888	36.7	4,057	36.3

OVERNIGHT BUSINESS TRAVEL

Only 25 percent of business travellers from Ontario stayed overnight (Table 12), accounting for the lowest percentage of overnight business travel within the province.

A higher percentage (87.6%) of overseas business travellers stayed overnight and just over 80 percent of U.S. business travellers (non-border states) stayed overnight. The number of overnight travellers is lower (33%) for those visitors from border states.

Table 12. OVERNIGHT VISITS AS A PERCENT OF ALL BUSINESS TRAVEL BY ORIGIN

	All Business Travel	Overnight Business	
		# of Visitors	% of Business Travel
OTHER CANADA	1050	750	71.4%
ONTARIO	7486	1857	24.8%
OTHER USA	700	586	83.7%
BORDER STATES	1524	504	33.1%
OVERSEAS	411	360	87.6%

Overnight business visitors from Ontario accounted for 46 percent of overnight business visits (Table 13). Of these, residents from Toronto accounted for the greatest number of overnight visits (10.7%).

Quebec accounted for the most overnight business visitors from a single Canadian province other than Ontario. With the exception of Toronto, Montreal accounted for the greatest number of visits from a city within Canada.

The border states of Michigan, Ohio, New York and Illinois, in descending order were origins with the highest numbers of overnight business travellers.

TABLE 13: OVERNIGHT BUSINESS TRAVEL VISITORS IN ONTARIO BY ORIGIN

ORIGIN	All Other Over-Night Visitors (000'S)	%	Overnight Business Visitors (000'S)	%
OTHER CANADA	2,194	6.3	2,607	64.2
ONTARIO	25,167	72.1	1,857	45.8
Toronto	7,798	22.4	435	10.7
Ottawa/Hull	1,984	5.7	214	5.3
Niagara falls	642	1.8	25	0.6
Kingston	560	1.6	77	1.9
Windsor	447	1.3	44	1.1
QUEBEC	1,194	3.4	344	8.5
Montreal	748	2.1	262	6.5
Quebec City	70	0.2	29	0.7
MANITOBA	330	0.9	77	1.9
Winnipeg	282	0.8	68	1.7
ATLANTIC CANADA	265	0.8	92	2.3
Halifax	57	0.2	29	0.7
WESTERN CANADA	404	1.2	239	5.9
Vancouver	115	0.3	93	2.3
Calgary	68	0.2	69	1.7
Edmonton	48	0.1	31	0.8
Saskatoon	16	*	5	0.1
Regina	15	*	4	0.1
OTHER USA	918	2.0	586	14.0
BORDER STATES	4,780	13.0	504	12.0
Michigan	1,292	3.7	119	2.9
New York	1,181	3.4	85	2.1
Ohio	613	1.8	99	2.4
Pennsylvania	455	0.8	61	1.5
Illinois	292	0.8	68	1.7
Minnesota	242	0.7	34	0.8
Wisconsin	200	0.6	37	0.9
California	141	0.4	84	2.1
New Jersey	114	0.3	47	1.2
Florida	110	0.3	27	0.7
Massachusetts	97	0.3	37	0.9
OVERSEAS	1,828	5.2	360	8.9
United Kingdom	337	1.0	43	1.1
Japan	165	0.5	62	1.5
Germany	186	0.5	23	0.6
France	169	0.5	15	0.4
Hong Kong	95	0.3	9	0.2
South Korea	67	0.2	24	0.6
Australia	67	0.1	15	0.4
Italy	23	0.1	12	0.3
Netherlands	57	0.2	6	0.2
India	40	0.1	6	0.2
Taiwan	33	0.1	10	0.3
Mexico	30	0.1	12	0.3
Israel	36	0.1	5	0.1
Switzerland	34	0.1	5	0.1
Brazil	29	0.1	7	0.2

Percentages rounded to nearest decimal *less than 0.1%

LENGTH OF STAY (OVERNIGHT VISITORS)

As would be expected, the average length of stay (Table 14) for overseas business visitors was longer than the trip length for business visitors from other origins. Ontario residents travelling for business reported the lowest average number of nights of all visitors as well as business visitors. For visitors from all origins, business visitors tend to stay for a shorter length of time than all visitors.

TABLE 14: OVERNIGHT BUSINESS TRAVEL VISITORS BY AVERAGE NUMBER OF NIGHTS

ORIGIN	Average Number Of Nights	
	All Other Overnight Visitors	Overnight Business Visitors
OTHER CANADA	4.7	4.6
ONTARIO	2.7	2.2
OTHER USA	4.3	3.1
BORDER STATES	3.3	2.2
OVERSEAS	8.9	5.5

EXPENDITURE (OVERNIGHT VISITORS)

Ontario residents had the lowest average spending (Table 15) per overnight business visitor ($347). This figure is not surprising given that Ontario residents had shorter visits compared to other visitors.

Overnight American business travellers from non-border states had an average per person expenditure of $884. When looking at overnight business visitors from bordering U.S. states, the expenditures are almost 40 percent less ($543) than business visitors from other U.S. origins.

Overseas business visitors had the highest average spending at $1316 per person. This expenditure is thirty percent more than the average spent by all overseas overnight travellers to Ontario. Given that the average number of nights was smaller than that of all overseas visitors, these expenditure figures support suggestions that business visitors spend more on average.

Table 15. OVERNIGHT EXPENDITURES (average per-day)		
	ALL OVERNIGHT VISITORS (000's)	OVERNIGHT BUSINESS VISITORS (000's)
OTHER CANADA	$373,687	$1,021,241
Average	$170.32 /person	$391.73 /person
ONTARIO	$182,159	$644,796
Average	$86.70 /person	$347.22 /person
OTHER USA	$501,036	$518,374
Average	$545.79 /person	$884.59 /person
BORDER STATES	$1,002,947	$275,094
Average	$209.82 /person	$545.82 /person
OVERSEAS	$1,506,641	$473,858
Average	$824.20 /person	$1316.50/person

VISITS TO ONTARIO TRAVEL REGIONS

Overall, Metro Toronto was the top region for overnight stays among overnight business travellers, accounting for 49 percent of total visits. This is also the case for all overnight travellers to Ontario in that Metro Toronto (19.1%) was the most popular region. Ontario East, which includes Ottawa, was the second most popular destinations overnight business travellers (18.7%) but third most popular for other visitors staying overnight.

Table 16. OVERNIGHT BUSINESS VISITS IN ONTARIO'S TRAVEL REGIONS

	All Other Overnight (000's)	(%)	Overnight Business (000's)	(%)
1-SW Ontario	4,238	12.1	353	8.7
2-Festival	5,897	16.9	480	11.8
3-Lakelands	5,168	14.8	171	4.2
4-Toronto	6,676	19.1	1,992	49.1
5-Getaway	4,728	13.5	184	4.5
6-Ontario East	5,839	16.7	758	18.7
OTAP 7-12	4,729	13.5	348	8.6
Unknown	243	0.6	3	*

Due to multiple visits, shares do not equal 100% **less than 0.1%*

SAME-DAY BUSINESS TRAVEL

There was a total of 7,114,000 same-day business visits to Ontario. Almost eighty percent (5,629,000) of all same-day (Table 17) business visitors came from Ontario. American visitors from border states accounted for fourteen percent of same-day business visits. Of little surprise is the finding that overseas visitors accounted for less than 1 percent of same-day business visitors.

TABLE 17: SAME-DAY BUSINESS TRAVEL VISITORS IN ONTARIO BY ORIGIN

ORIGIN	All Other Same-day Visitors (000's)	%	Same-day Business Visitors (000's)	%
OTHER CANADA	654	1.1	300	0.4
ONTARIO	40,648	67.5	5,629	79.1
OTHER USA	1,360	2.3	114	1.6
BORDER STATES	1,722	2.9	1,020	14.3
OVERSEAS	342	0.6	51	0.7

Percentages rounded to nearest decimal **less than 0.1%*

CONTRAST – ONTARIO'S BUSINESS MARKETS COMPARED TO PLEASURE AND VISITING FRIENDS/RELATIVES MARKETS

This section compares the preferences of the business traveller to those of other travel types.

In terms of number of visits (Table 18), business travellers were the smallest group (10%). Pleasure visitors were the largest travel group accounting for 42 percent of all visitors.

TABLE 18: TOTAL VISITORS IN ONTARIO

	Total (000's)	%
ALL VISITORS	106, 289	100.0
BUSINESS VISITORS	11,171	10.5
PLEASURE VISITORS	45,432	42.7
VISITING FRIENDS/RELATIVES	34,206	32.2
OTHER	15,408	14.6

The results shown in Table 19 suggest that business visitors tend to spend more than other visitor types. Compared to pleasure visitors, business visitors spent nearly one and one half times more than pleasure visitors and four times more than those visiting friends/relatives in Ontario.

Table 19. AVERAGE EXPENDITURES

	TOTAL (000'S)	AVERAGE
All Visitors	$10,691,074	$100.58
Business	$2, 714,053	$242.96
Pleasure	$4,739,271	$104.32
Visiting F/R	$2,045,849	$59.81

Table 20 shows the average party size of visitors to Ontario. Overall, business visitors had the smallest average party size (1.3) compared to pleasure travellers and those visiting friends and relatives.

Smaller average party sizes were consistent for all visitor types from Ontario and Canada.

Table 20. AVERAGE PARTY SIZE

	Total	Pleasure	VFR	Business
OTHER CANADA	1.6	1.8	1.8	1.1
ONTARIO	1.6	1.8	1.8	1.1
OTHER USA	1.9	2.4	2.0	1.4
BORDER STATES	1.9	2.3	2.0	1.5
OVERSEAS	1.8	2.3	1.6	1.5

Compared to other visitors, business visitors had the highest proportion (89.8%) of single adult only parties. This group also had the smallest proportion of children (1.7%) in the composition of travel parties compared to other travellers.

Table 21. PARTY COMPOSITION OF ONTARIO TRAVELLERS

	1 Adult (000's)	2 Adults (000's)	3+ Adults (000's)	Children (000's)
All Visitors	29,478	12,275	1,395	8,192
%	57.4%	23.9%	2.7%	16.0%
Business	7,992	644	113	151
%	89.8%	7.2%	1.3%	1.7%
Pleasure	8,251	5,445	727	3,824
%	45.3%	29.8%	4.0%	20.9%
Visit F/R	9,615	4,548	369	3,437
%	53.5%	25.3%	2.1%	19.1%
Other	3,620	1,638	186	780
%	58.2%	26.3%	3.0%	12.5%

CALENDER QUARTER

Business travellers differed from pleasure visitors and those visiting friends and relatives with respect to their preference of travelling in the first (27.9%) and second quarter (26.7%). Pleasure visitors however, preferred to travel in the third (41.0%) and second quarters (23.9%) respectively. Travellers visiting friends and relatives travelled in the second half of the year, specifically, the third (28.3%) and fourth quarter (24.7%) respectively.

Table 22. CALENDER QUARTER OF ONTARIO VISIT

	All (000's)	Business (000's)	Pleasure (000's)	Visit F/R (000's)
QUARTER I (JAN-MAR)	23,402 (22%)	3,119 (27.9%)	8,494 (18.7%)	8,366 (24.5%)
QUARTER II (APR-JUN)	25,176 (23.7%)	2,984 (26.7%)	10,843 (23.9%)	7,595 (22.2%)
QUARTER III (JUL-SEPT)	35,206 (33.1%)	2,582 (23.1%)	18,717 (41.0%)	9,697 (28.3%)
QUARTER IV (OCT-DEC)	22,505 (21.2%)	2,488 (22.3%)	7,378 (16.2%)	8,547 (24.7%)

ACTIVITY PARTICIPATION

Shopping was the most popular activity for business travellers (14.2%) and those visiting friends and relatives (19.3%). Pleasure visitors, however, preferred participating in outdoor sports (31.3%) over shopping (28.3%). Sightseeing was ranked second for business visitors (7.8%) compared to pleasure visitors and those visiting friends and relatives. These visitors ranked shopping second (28.3%) and outdoor (19.3%) sports (pleasure visitors and visiting friends and relatives respectively).

TABLE 23. ACTIVITY PARTICIPATION

	All (000's)	Business (000's)	Pleasure (000's)	Visit F/R (000's)
Festivals/Fairs	3145	215	1850	938
	3.0%	1.7%	4.0%	2.7%
Cultural Events	7,816	409	5,378	1,703
	7.4%	3.7%	11.8%	5.0%
Sports Events	6,122	272	4,685	661
	5.8%	2.4%	10.3%	1.9%
Shopping	24,407	1,589	12,879	65,84
	22.9%	14.2%	28.3%	19.3%
Sightseeing	16,540	871	11,752	3,131
	15.6%	7.8%	25.9%	9.2%
Nightlife/ Entertainment	5,128	692	5,375	1,492
	4.8%	6.2%	11.8%	4.4%
Theme Parks	2,018	71	1,528	336
	1.9%	0.6%	3.4%	1.0%
Parks/Historic Sites	6,348	296	4,731	1,042
	5.9%	2.6%	10.4%	3.1%
Outdoor Sports	20,699	564	14,223	4,963
	19.5%	5.1%	31.3%	14.5%
No Listed Activities	13,150	6,834	2,475	19
	12.4%	61.2%	5.4%	0.1%

Due to multiple activity participation, shares do not equal 100%

TRAVEL REGION VISITED

The three most popular OTAP regions (Table 24), Southwestern Ontario, Festival Country and Metro Toronto were the same for each type of visitor. However, the ranking of each region as first, second and third most popular varied for each type. For the business traveller, Metro Toronto (36.4%) was the most popular destination compared to Southwestern Ontario (20.3%) for those visiting friends or relatives, and Festival Country (21.8%) for pleasure visitors. Southwestern Ontario was the second most popular destination for business (16.4%) and pleasure visitors (19.4%), while Festival Country (19.6%) ranked second for those visiting friends and relatives. Festival Country ranked third for business visitors while Metro Toronto ranked third for the other two types of visitors.

Table 24. OTAP REGION VISITED

	All (000's)	Business (000's)	Pleasure (000's)	Visit F/R (000's)
1-Southwestern ON	22,543	1,835	8,847	6,938
%	21.2%	16.4%	19.4%	20.3%
2-Festival Country	21,417	1,734	9,946	6,733
%	20.2%	15.5%	21.8%	19.6%
3-Lakelands	9,452	480	5,520	2,853
%	8.9%	4.2%	12.1%	8.3%
4-Metro Toronto	20,225	4,061	7,075	6,696
%	19.0%	36.4%	15.6%	19.5%
5-Getaway	10,831	790	4,628	4,326
%	10.2%	7.1%	10.1%	12.6%
6-Ontario East	15,019	1,608	6,375	5,053
%	14.1%	14.4%	14.0%	14.8%
7-Near North	1,247	81	498	543
%	1.2%	0.7%	1.1%	1.6%
8-Rainbow Country	2,480	129	1,137	815
%	2.3%	1.1%	2.5%	2.4%
9-Algoma Country	1,685	94	1,062	300
%	1.6%	0.8	2.3%	0.9%
10-James Bay Frontier	1,372	104	723	287
%	1.3%	0.9%	1.6%	0.8%
11-North of Superior	1,140	105	607	234
%	1.1%	0.9%	1.3%	0.7%
12- Sunset Country	1,437	156	665	208
%	1.4%	1.4%	1.5%	0.6%
OTAP Unknown	576	290	125	147
%	0.5%	2.6%	0.3%	0.4%

Due to multiple activity participation, shares do not equal 100%

MODE OF TRANSPORT

The automobile was the most popular mode of transport for the three visitor types. However, a higher percentage of those visiting friends and relatives used the automobile compared to pleasure and business travellers. The second most popular mode of transport for business travellers was the plane. This differed from pleasure visitors and travellers visiting friends and relatives who noted that the bus is the second most preferred mode.

Table 25. MODE OF TRANSPORT

	ALL (000's)	BUSINESS (000's)	PLEASURE (000's)	VISIT F/R (000's)
Auto	97,500	9,294	41,381	32,176
	91.7%	83.2%	91.0%	94.1%
Plane	2,453	1,195	560	524
	2.3%	10.7%	1.2%	0.2%
Train	1,361	162	658	430
	1.3%	1.5%	1.4%	1.3%
Bus	9,737	326	2,236	761
	9.2%	2.9%	4.9%	2.2%
Other	2,852	502	1,499	694
	2.7%	4.5%	3.3%	2.0%

CONVENTION TRAVELLERS

CANADIAN BUSINESS CONVENTION TRAVELLERS

Of total same-day and overnight business travellers originating from Canada (8.5 million), 661,000 visited Ontario for the purpose of attending a business convention. Of these 419,000 were overnight visits and 232,000 were same-day visits. Just over one half million (516,000) Ontarians travelled within the province for the purpose of attending a convention.

OVERNIGHT AND SAME-DAY BUSINESS TRAVEL BY OTAP REGION VISITED

Table 26 identifies the same-day and overnight trips taken by Canadian travellers to Ontario. Both same-day and overnight business convention travellers from Canada made Toronto the most popular travel region (45.3% and 53.1% respectively). The second most popular travel region for convention travellers was Festival Country (18.5%) for same-day visitors and Ontario East (17.7%) for overnight visitors.

Table 26. BUSINESS VISITS IN ONTARIO'S TRAVEL REGIONS (CANADIAN TRAVELLERS)

	Overnight Convention (000's)	(%)	Same-Day Business Convention (000's)	(%)
1-SW Ontario	23	5.4	21	9.1
2-Festival	46	10.7	43	18.5
3-Lakelands	25	5.8	3	1.3
4-Toronto	228	53.1	105	45.3
5-Getaway	19	4.4	21	9.1
6-Ontario East	76	17.7	39	16.8
OTAP 7-12	20	4.7	8	3.5

Due to multiple visits, shares do not equal 100%

CANADIAN CONVENTION TRAVEL BY OTAP REGION VISITED

With the exception of same-day travellers from other regions in Canada, business travellers from Ontario and other Canadian provinces attending a convention made Toronto the most popular destination (Table 27). Overnight business travellers from Ontario made Eastern Ontario their second most popular destination (13.5%) followed by Festival Country (14.8%). Festival Country was also the second most popular destination (19.6%) for same-day travellers from Ontario attending a convention followed by Ontario East (16.0%). Overnight travellers from provinces other than Ontario, visited Toronto (62.9%) the most, followed by Ontario East (27.3%).

Table 27. BUSINESS CONVENTION VISITS IN ONTARIO'S TRAVEL REGIONS BY ORIGIN (CANADIAN TRAVELLERS ONLY)

	Ontario Residents (000's)		Other Canadian Residents (000's)	
	Over-night	Same-day	Over-night	Same-day
1-SW Ontario	19	21	4	-
%	6.4	9.6	3.0	
2-Festival	44	43	2	-
%	14.8	19.6	1.5	
3-Lakelands	17	3	8	-
%	5.7	1.4	6.1	
4-Toronto	144	94	83	11
%	48.5	42.9	62.9	84.6
5-Getaway	16	21	3	-
%	5.4	9.6	2.3	
6-Ontario East	40	35	36	4
%	13.5	16.0	27.3	30.8
OTAP 7-12	19	8	-	-
	6.4	3.7		

Due to multiple visits, shares do not equal 100%

CANADIAN CONVENTION TRAVEL BY NUMBER OF NIGHTS

The greatest number of overnight convention visitors from Ontario stayed for two nights (34.7%). The second highest number of nights stayed for convention travellers from Ontario was one night (33.0%) followed by three nights (25.6%). Residents of other parts Canada noted that the highest number of nights stayed was three nights (27.3%) followed by two nights (25.8%).

Table 28. NUMBER OF NIGHTS FOR OVERNIGHT BUSINESS CONVENTION VISITORS (CANADIAN TRAVELLERS ONLY)

	Ontario (000's)	Other Canada (000's)
1 Night	98	15
%	33.0	11.4
2 Nights	103	34
%	34.7	25.8
3 Nights	76	36
%	25.6	27.3
4 Nights	13	21
%	4.4	15.9
5 Nights	14	3
%	4.7	2.3
6-9 Nights	4	10
%	1.3	7.6
10 +	-	-

CANADIAN CONVENTION TRAVELLER ACTIVITY PARTICIPATION

Participation in any sightseeing activity (Table 29) was the most popular for all business convention visitors (17.7%). Participation in any cultural activity was ranked second (14.8%) and visitation to any bar/casino was ranked third (12.9%).

Table 29. NUMBER OF NIGHTS FOR OVERNIGHT BUSINESS CONVENTION VISITORS (CANADIAN TRAVELLERS ONLY)

	Total (000's)	Percent (%)
Any Cultural Activities	98	14.8
Any Cultural Performance	55	8.3
Any Natural Park	15	2.3
Any Bar/Casino	85	12.9
Water-Based Activities	7	1.1
Any Hunting-Fishing	1	0.1
Any Winter Sports	7	1.1
Any Fitness/Naturalist	40	6.1
Any Sightseeing/ Cruise/ Boat Tour	117	17.7

Due to multiple activity participation, shares do not equal 100%

UNITED STATES BUSINESS CONVENTION, CONFERENCE, TRADE SHOW AND SEMINAR TRAVELLERS

There were 326,000 United States travellers visiting for the purpose of attending a business-related convention, conference, trade show or seminar. Just over half (170,000) of U.S. visitors were from bordering states and 269,000 U.S. convention visitors stayed overnight.

OVERNIGHT U.S. CONVENTION TRAVEL BY ORIGIN

The highest number of business convention visitors (total) travelled from New York State (37.9%). Michigan had the second highest number of business convention travellers (18.3%).

Table 30. BUSINESS CONVENTION, CONFERENCE, TRADE SHOW & SEMINAR VISITS (U.S. TRAVELLERS)

	Total (000's)	(%)	Overnight Only (000's)	(%)
New York	64	19.6	22	8.2
Michigan	31	9.5	31	11.5
Pennsylvania	15	4.6	14	5.2
Minnesota	7	2.2	6	2.2
Ohio	27	8.3	27	10.0
Illinois	12	3.7	11	4.1
Wisconsin	13	4.0	13	4.8
All Other	156	47.9	146	46.1

U.S. CONVENTION TRAVEL BY OTAP REGION VISITED

Almost three quarters (73.9%) of all convention visitors from the U.S. visited Toronto (Table 31). The second most popular region for U.S. visitors was Festival Country (14.4%).

Table 31. BUSINESS VISITS IN ONTARIO'S TRAVEL REGIONS (U.S. TRAVELLERS)

	Convention (000's)	(%)
1-SW Ontario	17	5.2
2-Festival	47	14.4
3-Lakelands	3	0.9
4-Toronto	241	73.9
5-Getaway	6	1.8
6-Ontario East	24	7.4
OTAP 7-12	10	3.1

Due to multiple visits, shares do not equal 100%

U.S. CONVENTION TRAVEL BY NUMBER OF NIGHTS

A higher number of U.S. convention visitors stayed three nights while visiting Ontario (20.1%). The second and third highest groups were three nights and four nights respectively.

Table 32. NUMBER OF NIGHTS FOR OVERNIGHT BUSINESS CONVENTION VISITORS (U.S. TRAVELLERS ONLY)

	U.S. (000's)	%
1 Night	37	13.7
2 Nights	54	20.0
3 Nights	56	20.1
4 Nights	49	18.1
5 Nights	43	15.9
6-9 Nights	27	10.0
10 – 16 Nights	4	1.5
17-30 Nights	-	-
31+	-	-

U.S. CONVENTION TRAVELLER ACTIVITY PARTICIPATION

For both total U.S. convention visitors and overnight convention visitors from the U.S., participation in activities was ranked the same (Table 33). For example participation in any cultural activity was the most popular for all business convention visitors (40.5%) and for overnight visitors (34.9%). Participation in any cultural performance was ranked second (30.1% and 23.1%, total and overnight visitors respectively). Visitation to other attractions was ranked third (10.4% and 11.9%, total and overnight visitors respectively).

TABLE 33. ACTIVITY PARTICIPATION (U.S. CONVENTION TRAVELLERS ONLY)

	Total (000's)	Over-night (000's)
Any Cultural Activities	132	94
%	40.5	34.9
Any Cultural Performance	98	62
%	30.1	23.1
Water-Based Activities	3	2
%	0.9	0.7
Any Winter Sports	18	16
%	5.5	5.9
Other Attractions	34	32
%	10.4	11.9

Due to multiple activity participation, shares do not equal 100%

INTERNATIONAL VISITORS BUSINESS CONVENTION, CONFERENCE, TRADE SHOW AND SEMINAR TRAVELLERS

There were a total of 128,000 international visitors that travelled to Ontario for the purpose of attending a business convention, conference, trade show or seminar. Of these visitors, 113,000 were overnight visitors to Ontario. Primary markets accounted for slightly more than 30 percent with Japan accounting for 15,000 followed by the United Kingdom with 14,000. Forty-two thousand overseas business travellers visited Ontario for other business related work. Just over 40% (18,000) of these visitors were made up of visitors from Ontario's primary markets.

INTERNATIONAL CONVENTION TRAVEL BY ORIGIN

The highest number of international business convention visitors travelled from Japan (11.7%), United Kingdom (10.9%), Germany (5.5%) and France (2.3%) respectively.

Table 34. BUSINESS CONVENTION, CONFERENCE, TRADE SHOW & SEMINAR VISITS (INTERNATIONAL VISITORS)

	Total (000's)	(%)
United Kingdom	14	10.9
France	3	2.3
Germany	7	5.5
Japan	15	11.7
Other Europe	26	20.3
Other Asia	35	27.3
All Other	28	21.9

INTERNATIONAL CONVENTION TRAVEL BY OTAP REGION VISITED

Toronto was the most popular destination (Table 35) for international convention visitors (69.5%). Followed by Ontario East (21.8%) and Festival Country (13.3%).

Table 35. BUSINESS VISITS IN ONTARIO'S TRAVEL REGIONS (INTERNATIONAL TRAVELLERS)

	Overnight Convention (000's)	(%)
1-SW Ontario	2	1.5
2-Festival	17	13.3
3-Lakelands	2	1.6
4-Toronto	89	69.5
5-Getaway	5	3.9
6-Ontario East	31	16.4
OTAP 7-12	2	1.6

Due to multiple visits, shares do not equal 100%

INTERNATIONAL CONVENTION TRAVEL BY NUMBER OF NIGHTS

As expected, international convention visitors tended to stay for more nights (Table 36). For instance, just over 25 percent of visitors stayed between six and nine nights. Overnight visits of three nights (15.6%) were also popular for international convention visitors followed by stays of four nights (11.7%)

Table 36. NUMBER OF NIGHTS FOR OVERNIGHT BUSINESS CONVENTION VISITORS (INTERNATIONAL TRAVELLERS ONLY)

	International Travellers (000's)	%
1 Night	4	3.1
2 Nights	12	9.4
3 Nights	20	15.6
4 Nights	15	11.7
5 Nights	12	9.4
6-9 Nights	34	26.6
10 – 16 Nights	14	10.9
17-30 Nights	2	1.6
31+	2	1.6

INTERNATIONAL CONVENTION TRAVELLER ACTIVITY PARTICIPATION

Participation in any cultural activity was the most popular activity (Table 37) for all international business convention visitors (50%). Participation in any cultural performance was ranked second (32.9%) and visitation to other attractions was ranked third (16.3%).

Table 37. ACTIVITY PARTICIPATION (INTERNATIONAL TRAVELLERS ONLY)

	Total (000's)	%
Any Cultural Activities	64	50
Any Cultural Performance	42	32.9
Water-Based Activities	3	2.1
Any Winter Sports	13	10.5
Other Attractions	21	16.3

Due to multiple activity participation, shares do not equal 100%

APPENDIX A - METHODOLOGY

The information contained in this report, with the exception of the historical data, was extracted from the micro data files of the Canadian Travel Survey (CTS) and the International Travel Survey (ITS) by Research Resolutions, on behalf of the Ontario Ministry of Tourism (MTOUR).

Co-sponsored by all the provinces and the federal government, the CTS is conducted by Statistics Canada during even-numbered years (annually starting in 1997) as a supplement to the Labour Force Survey. The CTS telephone interview captures the incidence and detail of travel by Canadians. In 1996, an average of 17,540 Canadian households — including 5,286 Ontario households — were surveyed every month throughout the year (this sample is double than that used in 1994). The average response rates for Canadian and Ontario respondents was 91%.

While in 1994 only the name of a trip's destination was available from the CTS, as well as the name of the province where an overnight stop might have occurred en route to the trip's destination, in 1996 the complete trip itinerary was collected. As such, at the sub-provincial level, only visits with a destination in a specific region are comparable between 1996 and 1994. Total domestic visits to a provincial region were not known in 1994.

In addition to the change in the location question, in 1996 the CTS captured the interview data on a CAI system, rather than on paper as was the case in 1994.

In 1995, Statistics Canada revised its estimates of Canada's population to include non-permanent residents as well as an estimate for under coverage. Since the CTS is projected to total population, the 1994 data previously released by Ontario in the Tourism Monograph No 3 (entitled "Ontario's Domestic Travel Markets - 1994") were revised at the end of 1995.

The domestic data contained in this report differ from those reported in print or supplied in electronic format by Statistics Canada in the following ways:

1. All overnight trips, regardless of the distance travelled, and same-day trips with a minimum one-way distance from a respondent=s home of at least 40 kms are included in this report.

2. Overnight trips with an Ontario destination, but no nights spent in the province, are treated in this report as same-day trips to Ontario.

3. The domestic data contained in this report include visits in Ontario by Canadians while on trips to any destination, not just Canadian destinations.

Excluded from this report=s domestic data are the following types of travel: travel as a member of an operating crew of a bus, plane, truck, etc.; commuting to and from work or school; one way travel involving a change of residence; travel in an ambulance to a hospital or clinic; trips that did not originate in Canada; and trips longer than one year. A domestic trip must also meet a distance requirement as follows:

Length Of Stay	PLACE OF RESIDENCE	
	Ontario	Other Canada
Same-day	40 Kms one-way from home	80 Kms one-way from home
Overnight	No minimum distance	No minimum distance

The ITS is also conducted by Statistics Canada every year with the help of Canada Customs and Immigration authorities who essentially conduct a census of border crossings and distribute the questionnaires to individual travellers. The questionnaires are self-completed by the travellers and mailed back to Statistics Canada.

The international statistics presented in this report are based on the census of U.S. and overseas visitors as far as the number of travellers, their origin and the mode of transport is concerned. Most of the remaining trip characteristics were obtained from 14,599 completed questionnaires by U.S. residents (out of 30,601 usable questionnaires of U.S. visitors to Canada) and 7,035 completed questionnaires by overseas visitors (out of 12,658 usable questionnaires of overseas visitors to Canada). The overall response rate across Canada was 6.8% for U.S. residents and 4.1% for overseas residents.

The data contained in this report differ from those reported in the Touriscope, or supplied electronically by Statistics Canada, primarily due to the following:

1. Since the ITS long questionnaire does not contain a question on visitor destination, Ontario created a main destination variable according to the number of nights a visitor stays in Ontario/Canada.

2. Statistics Canada does not allocate Canadian carrier fares to the provinces. Ontario does so based on the mode of transport and the port of entry/exit.

3. Ontario does a number of imputations for missing values.

4. Statistics Canada allocates expenditures to the provinces based on the number of nights a visitor spends in each place. Ontario distinguishes between accommodation expenditures and other expenditures. The former are distributed according to the number of nights a visitor spent in various places and according to whether or not commercial accommodation was used in each overnight stop.

For more details on how Ontario manipulates the data base, please write to the address below:

Ontario Ministry of Tourism
Tourism Policy & Research Branch
900 Bay Street, Hearst Block, 9th Floor
Toronto, Ontario, Canada
M7A 2E1

Telephone: (416)-314-7321
Fax: (416)-314-7341

GLOSSARY

ACCOMMODATION TYPE refers to the type(s) of accommodation used during the trip.

> ***Other* accommodation** is a separate category in the CTS and ITS questionnaires, and includes dormitories, hostels, sleeping berths on trains and boats, etc. In many of the tabulations contained in this report, accommodation type "not stated" records have been combined with *other*.

ACTIVITIES ON TRIP. For each trip, respondents were asked to indicate whether they participated in any of a number of activities (aided measure). The activity could have occurred at any location on the trip (destination, location of overnight stop) since activity data are not captured on a location-specific basis.

ALL OTHER (VISITOR TYPE) – Shows data for all visitor types less business visitor data.

BUSINESS TRAVELLER MARKET SEGEMENT. This segment respondents includes those respondents that selected *business* as their main purpose for travelling.

CONVENTION VISITORS. For the purpose of this report, convention traveller refers to those business visitors to Ontario that travelled for the purpose of attending a work-related convention, conference, seminar or trade show.

CULTURAL ACTIVITY. Refers to any cultural related activity such as theatres, museums, historic sites and festivals.

CULTURAL PERFORMANCE. Refers to visitation to performing art venues only.

DESTINATION OF TRIP. In the CTS, the location—city/town and province (Canada) or city/state (USA) or country (other countries) -- volunteered by the respondent as the *destination* of the trip. If multiple destinations are named in the CTS interview (e.g., a touring trip), interviewers are instructed to record the location that is *furthest* from the respondent's home.

In the ITS questionnaire this question is not available, but rather it is imputed by Ontario based on the majority of nights a visitor spends in Canada..

EXPENDITURES ON TRIP. All dollars spent by all household members or party members who went on the trip and paid for by individuals, government or private sector business. Only expenditures incurred by visitors to Ontario are contained in this report. Spending by Ontarians on (Canadian) public fares for trips outside the province and with no visit in Ontario are not included here.

The following items of expenditures are excluded:

- food and beverage purchased prior to the trip to be used while on the trip;
- items purchased to be resold or used in a business;
- vehicles, such as cars, boats and caravans;
- capital investment, such as real estate, work of arts, rare articles and financial stocks;
- cash given to friends or relatives during a trip which does not represent payment for goods and services received, as well as donations to institutions.

EXPENDITURES IN ONTARIO. Canadian residents' expenditures on the trip are assigned by Statistics Canada to provinces of origin, destination, and location of overnight stops according to pre-set rules. Expenditures from the ITS were assigned to Ontario according to MTOUR rules.

EXPENDITURES IN ONTARIO BY TRIP CHARACTERISTICS. Ontario expenditures reported for trips with specific characteristics such as activity, are the *dollars* assigned to Ontario by Statistics Canada for trips with the specified characteristic. They do not represent expenditures on the service or activity. For example, the average expenditures associated with trips that included visiting a theme park refer to *average* spending in

Ontario on the entire trip. It does not refer to spending *while visiting theme parks*.

HOUSEHOLD/PARTY TRIP. A trip involving one or more persons from the same household/party leaving and returning together. If four persons from the same household take a trip, it counts as one household-trip.

The CTS captures household-based information, while the ITS captures party-based (not necessarily belonging to the same household) information.

MODE OF TRANSPORT. Mode of transport refers to the one used in Canada. It does not refer to the transport mode used by international visitors to come to Ontario.

PERSON NIGHT. A night spent away from home by a person taking a trip. If two persons take a trip involving three nights away from home, that counts for six person nights.

PERSON TRIP. A trip taken by one person. If two persons from the same household go on a trip, it counts for two person trips. If the same person takes two trips, it also counts for two person trips.

PLEASURE MARKET SEGMENT. This segment respondents includes those respondents that selected *pleasure* as their main purpose for travelling.

PURPOSE OF TRIP (MAIN). The main purpose categories include *visiting friends/relatives, pleasure, personal, business, convention*. In this report, *business convention* has been combined with *business* and *pleasure* has been combined with *non-business convention*.

QUALIFYING TRIP. A *qualifying trip* in the CTS is defined as travel from the usual place of residence to a location any distance away if an overnight trip and at least 40 km (one-way) if a same-day trip for any purpose other than as a member of an operating crew of a bus, plane, truck, etc; commuting to work or school; moving to a new residence; travel in an ambulance to a hospital or clinic; trips that did not originate in Canada and trips that longer than one year. The distance minimum of 40 km applies only to same-day trips that originate in Ontario. In all other provinces, the minimum distance for a same-day trip is 80 km. In the ITS it includes all non-residents crossing the Canadian border (excludes crews of transportation firms).

REPORTING PERIOD. An one month reporting period is used by the CTS since the second quarter of 1992. All fieldwork takes place approximately three weeks after the *end* of the reporting period. For example, during the third week in July respondents would be asked to report on trips that ended in preceding June. In the ITS a respondent is given a questionnaire which he/she is asked to fill out when his/her trip is completed.

RESPONDENT. In the CTS, a randomly selected individual in the sampled household (from the Statistics Canada Labour Force Survey sampling frame) who is at least 15 years of age. Specifically excluded from the LFS coverage are residents of Yukon and Northwest Territories, persons living on Indian Reserves, full-time members of the Canadian Armed Forces and persons living in institutions (inmates of penal institutions and patients in hospitals or nursing homes who have resided in the institution for more than six months).

VISIT. Place of overnight stay or for same-day trips, the location of the trip's destination. If the respondent travelled twice to the same location during the same trip, only one visit is recorded at that location. In this report there are three types of visits at the sub-provincial level: visits that were destined to region x; visits that were destined to Ontario region y, but took an excursion to region x, and visits that were destined outside Ontario, but had an overnight stop in region x. A small number of CTS respondents with overnight trips indicated that had as their destination Ontario region x, but they spent no night in region x. These trips have been treated in this report as same-day trips to region x.

VISITING FRIENDS/RELATIVES MARKET SEGMENT. This segment respondents includes those respondents that selected *visiting friends/relatives* as their main purpose for travelling.

MAP OF ONTARIO'S TRAVEL REGIONS